

Legistar Approving Agenda Items/Files

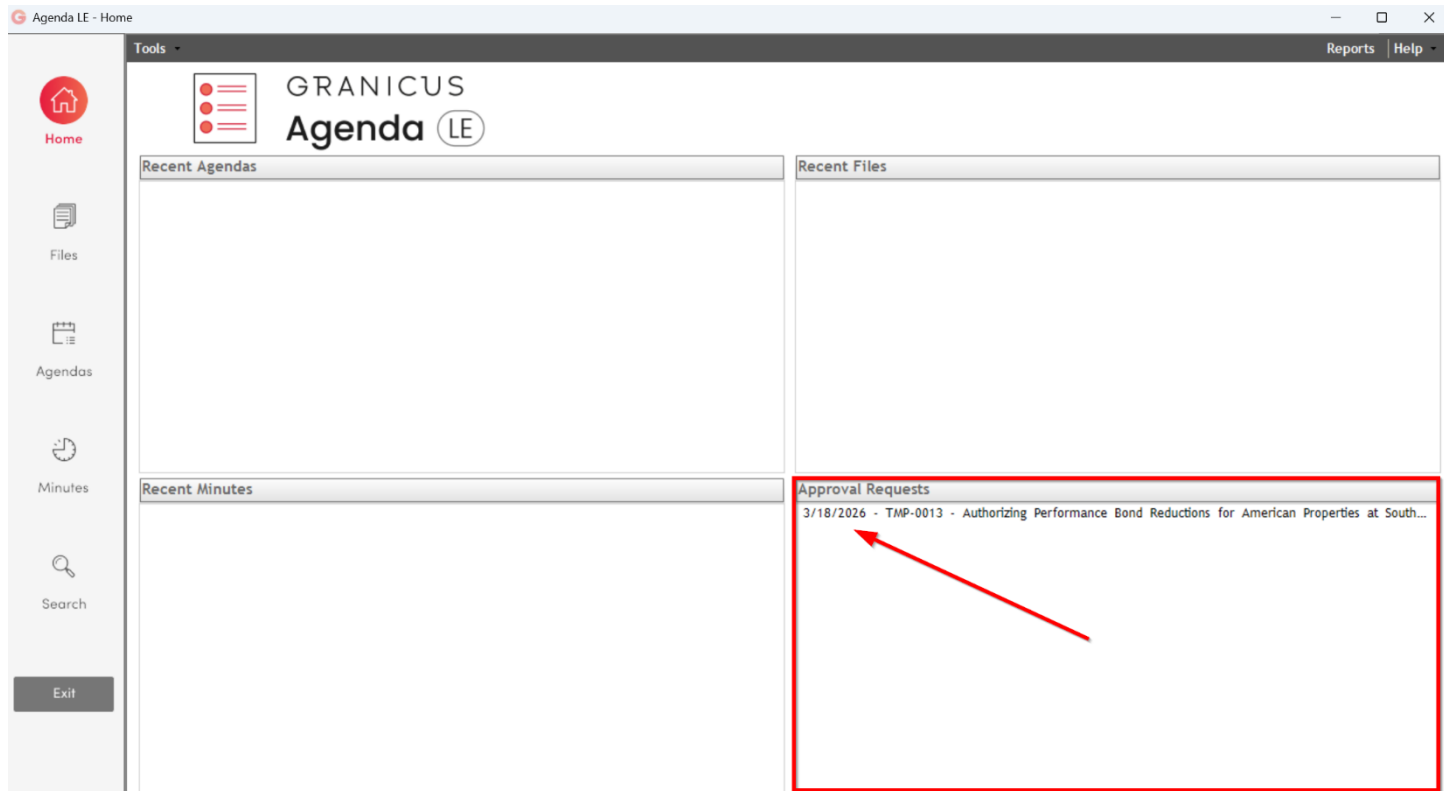
Bridgeport, CT

Overview

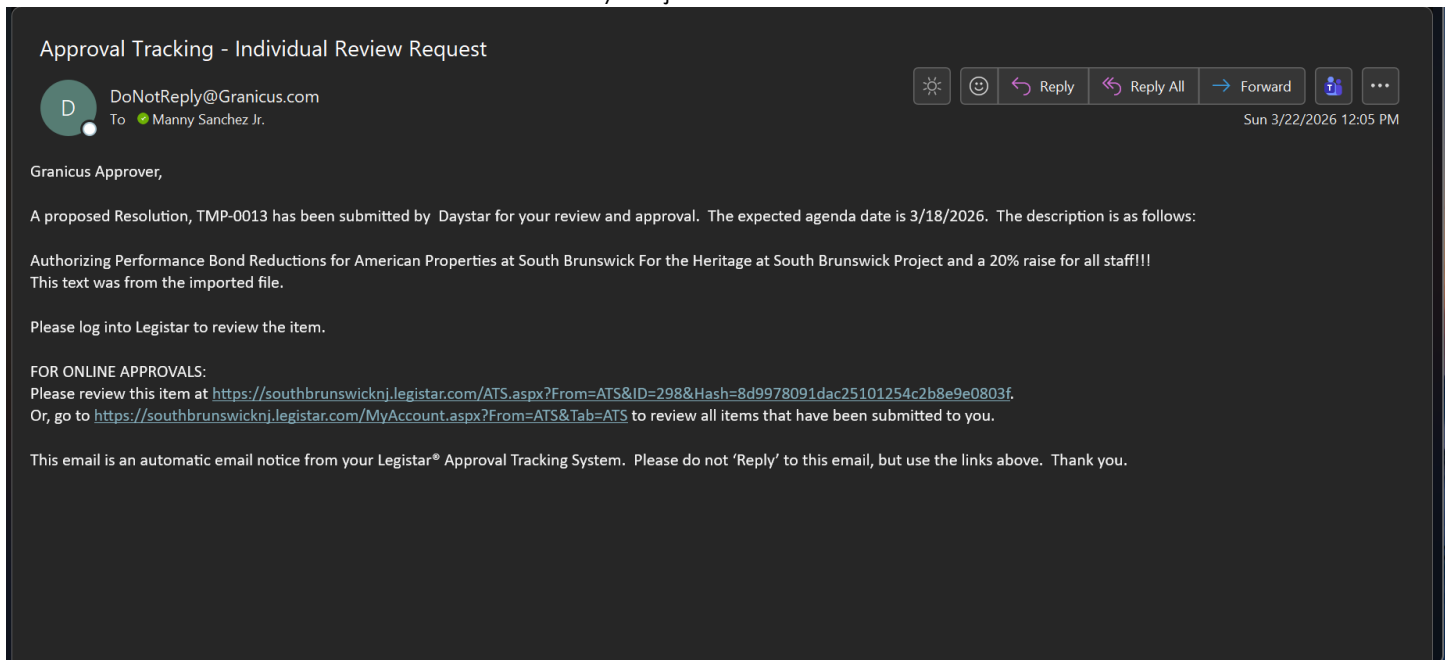
This quick reference guide provides instructions on how to review and Approve Agenda Items/Files. Most Files require review and approval prior to being added to an Agenda. Approvers will log into Legistar to review a File and act on it. Within the Legistar workflow, anyone who is part of an approval workflow is called an “Approver”.

Step 1: Reviewing an Agenda Item/File in Legistar

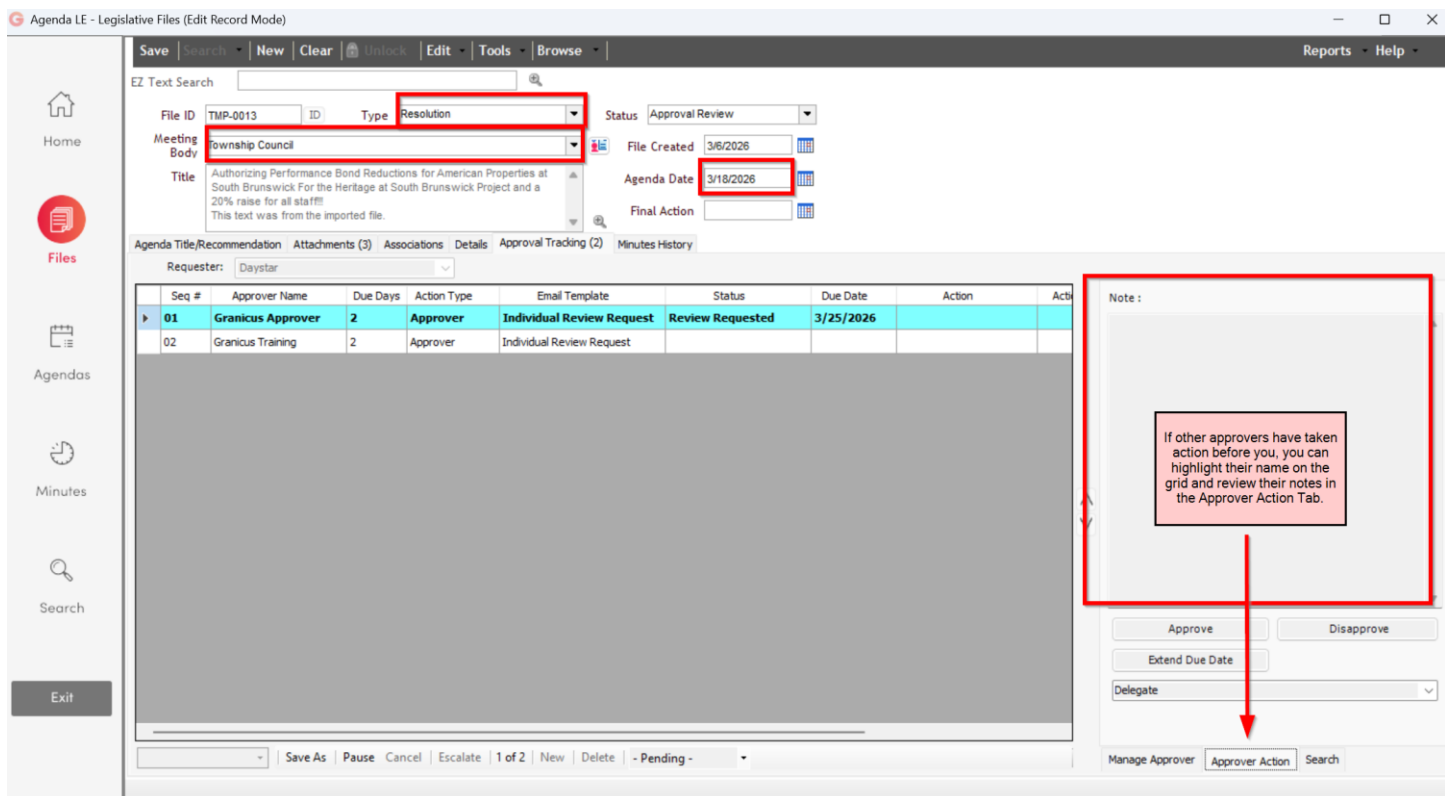
1. From the Home module, select the File to review and approve by double-clicking the item from the **Approval Requests** pane in the lower right quadrant of the screen. You will be taken to the **Approval Tracking tab**.



- You will receive an email letting you know there is an item for you to review. It gives you specific information details about the item to make your job a little easier.



- If applicable, review the **Type**, **Meeting Body**, and **Agenda Date** fields at the top of the screen. If you are *not* the first Approver in the sequence, you can also review any notes or actions from previous Approvers on the Approver Action tab. If you *are* the first Approver, there will not be any Approver or workflow history to review yet.



4. Click the **Agenda Title/Recommendation** tab. You can review the Agenda Item text by scrolling through the window at the bottom of the screen. **If edits to the Text File are required**, click **Edit** to access and open the Microsoft Word template to make changes. When changes are complete, click the **Save** icon in Word and **close** out of Word to save your changes to Legistar and return to the Files module.

NOTE: If changes are made to the **..title** section of the template, a pop-up box appears asking you to confirm the **Title** changes. Click **OK** to continue and update the Title field with the new template text.

NOTE: It may also be possible for Approvers to Import a new version of the Text File, rather than update the existing Text File. Please see Step 2, Option 2 of the South Brunswick, NJ Drafting Guide for instructions to Import a new Text File.

Agenda LE - Legislative Files (Edit Record Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: TMP-0013 ID: Type: Resolution Status: Approval Review

Meeting Body: Township Council File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!! This text was from the imported file. Agenda Date: 3/18/2026 Final Action:

Agenda Title/Recommendation Attachments (3) Associations Details Approval Tracking (2) Minutes History

Edit New Delete View Import...

Version 1 1 [Current] Set as Current

..title

Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!!

This text was from the imported file.

..body

WHEREAS, American Properties Realty Inc. has requested a reduction of the performance bonds posted for the Heritage at South Brunswick project, which consists of the construction of three hundred forty-nine (349) single family/townhome/apartment units (72 affordable) located at the intersection of Ridge Road, Schalks Crossing Road, and Perrine Road; and

WHEREAS, currently, the Township has the performance bonds listed below from American Properties Realty Inc, in the amounts of

	90% Performance Bond	10% Letter of Credit
Phase 1M	\$1,169,971.99	\$129,996.89
Phase 1S	\$450,460.28	\$50,051.14
Phase 2M	\$560,844.00	\$62,316.00
Phase 2S	\$996,299.89	\$110,699.99
Phase 3M/4M	\$451,333.08	\$50,148.12

5. Click the **Attachments** tab to review the attached documentation. To open a document, **double-click on the attachment name** in the grid, or highlight the attachment and click **Launch** from the bottom left toolbar.

After opening or launching an editable format attachment, you can edit the document. To save your changes back to Legistar, click the **Save** icon and **close** out of the attachment.

NOTE: Changes made to attachments in Legistar do NOT update the local copy saved to your local drive.

Other actions you can take on this tab are:

- Click **Attach** to add additional documentation.
- Rename attachments in the **Name** field, then click the **Update Attachment Details** button.
- Update or add notes for a specific attachment in the **Internal Notes** field, then click the **Update Attachment Details** button.
- **Replace** attachments with the **Replace** button.
- **Delete** attachments by clicking the **Remove** button; the arrow on this button will also give you the option to **Remove All** attachments at once.
- **Reorder** the attachments list with the up and down arrows next to the grid.

Agenda LE - Legislative Files (Edit Record Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: TMP-0013 ID Type: Resolution Status: Approval Review

Meeting Body: Township Council File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff! This text was from the imported file. Agenda Date: 3/18/2026 Final Action:

Agenda Title/Recommendation Attachments (3) Associations Details Approval Tracking (2) Minutes History

Sort	Attachments
1	South Brunswick NJ - Approving It...
2	Legistar - How to create new peop...
3	User Management - Active Users 12...

Name: Legistar - How to create new people.docx

Internal Notes: Notes are internal and not visible on any document or report. Also not on InSite for the public to see.

Attached On: 3/6/2026 Time: 4:19 PM

File Type: DataFile File Size: 453 KB

☒ Print With Packet 

☒ Show On Internet

[GRAN-JR7Y554]C:\Users\Manuel.Sanchez\OneDrive - Granicus, Inc\Legistar Docs\Legistar - How to create new peop

Attach Launch Replace Remove Update Attachment Details

- Click the **Associations** tab to review any potential selections. If any Associations need to be added or removed, click **Edit** for that section, move Associations left or right as needed. Click **Save**, then **Close**.
- Review the **Details** tab for any pertinent information. Update the tab as needed.

Step 2: Acting on a File

After reviewing a File and making any potential edits, Approvers are ready to act on the File. The actions Approvers can take are [Approving, Disapproving, or Delegating]. Each Approver can only take one action.

Approving a File

To **Approve** a File:

1. Click the **Approval Tracking** tab in the lower right when you are done reviewing and editing and are ready to act on the Agenda Item. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. Click the **Approver Action** tab in the lower right. From this tab you can enter a **Note** (optional for Approving), then click the **Approve** button to approve the File. Click **Yes** in the confirmation pop-up to complete your Approver Action.

Agenda LE - Legislative Files (Edit Record Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: TMP-0013 ID: Type: Resolution Status: Approval Review

Meeting Body: Township Council File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff! This text was from the imported file. Agenda Date: 3/18/2026 Final Action:

Agenda Title/Recommendation Attachments (3) Associations Details Approval Tracking (2) Minutes History

Requester: Daystar

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action
01	Granicus Approver	2	Approver	Individual Review Request	Review Requested	3/25/2026	
02	Granicus Training	2	Approver	Individual Review Request			

Note : Add a note before clicking on an action below. A note is optional when approving, but always recommended. Other users will be able to see your notes on this tab.

Approve Disapprove

Extend Due Date

Delegate

Manage Approver Approver Action Search

After you confirm your action, you can no longer edit this File. If there are more Approvers after you, the status of the File will remain **Approval Review** and the next Approver in the sequence is the only Approver that has access to edit and act on the File or Approval Sequence.

If you were the last Approver in the sequence, the status of the item will change to **Agenda Ready**.

Disapproving a File

If you **Disapprove** a File, Legistar requires you to enter notes about why you're disapproving the Agenda Item. The status of the File will change back to **Draft**. Legistar will send emails to the Drafter and previous Approvers informing them that the File has been Disapproved. After the Drafter has received the disapproved Agenda Item back, they can read the Approvers' notes, make the necessary changes, add a new Approval Sequence, and re-submit the File for approval. To **Disapprove** a File:

1. On the Approval Tracking tab, click the **Approver Action** tab in the lower right. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. **Entering a Note is required when Disapproving.** In the **Notes** field, enter details as to why you are disapproving and what changes need to be made. Be as detailed as possible.
3. Click the **Disapprove** button.

Agenda LE - Legislative Files (Edit Record Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: TMP-0013 | ID: | Type: Resolution | Status: Approval Review

Meeting Body: Township Council | File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!!
This text was from the imported file. | Agenda Date: 3/18/2026

Final Action:

Agenda Title/Recommendation | Attachments (3) | Associations | Details | **Approval Tracking (2)** | Minutes History

Requester: Daystar

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action
01	Granicus Approver	2	Approver	Individual Review Request	Review Requested	3/25/2026	
02	Granicus Training	2	Approver	Individual Review Request			

Note :
Adding a note is required when disapproving an item. Enter in detailed notes about why you are disapproving the item and what needs to be changed before the sequence is ready to be restarted.

Approve | **Disapprove**

Extend Due Date

Delegate

Manage Approver | **Approver Action** | Search

Save As | Pause | Cancel | Escalate | 1 of 2 | New | Delete | - Pending -

Agenda LE - Legislative Files (Edit Record Mode)

Save Search New Clear Lock Edit Tools Browse Reports Help

EZ Text Search

File ID: TMP-0013 ID Type: Resolution Status: **Draft**

Meeting Body: Township Council File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff! Agenda Date: 3/18/2026

This text was from the imported file. Final Action:

Agenda Title/Recommendation Attachments (3) Associations Details Approval Tracking (1) Minutes History

Requester: Daystar

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Acti
01	Gracious Approver	2	Approver	Individual Review Request	Disapproved	3/25/2026	Disapprove	3/22/2

Note:

Adding a note is required when disapproving an item. Enter in detailed notes about why you are disapproving the item and what needs to be changed before the sequence is ready to be restarted.

Approve Disapprove

Extend Due Date

Delegate

Manage Approver **Approver Action** Search

- Add Sequence - Save As Start Cancel Escalate 1 of 1 New Delete - Pending -

- Click **Yes** at the confirmation pop-up message. The status will change from Approval Review to **Draft**, and the Drafter will be notified via email. The Drafter will be in control of the File until a new Approval Sequence is started.

NOTE: Any Approvers who were coming up in the sequence and had not yet been notified of the Agenda Item will be removed from the workflow. Only Approvers who had previously taken an action will have their historical record and notes retained in the workflow grid.

Delegating a File

Approvers can Delegate their turn to review, edit, and take an action on the Agenda Item to another eligible Approver in the database. To **Delegate** a File:

1. On the Approval Tracking tab, click the **Approver Action** tab in the lower right. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. Entering a **Note** is optional when Delegating; however, it is *highly recommended* to provide the delegate Approver with as much information as possible. In the **Notes** field, enter details about why you're delegating the Agenda Item and any applicable instructions.

Agenda LE - Legislative Files (Edit Record Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: TMP-0013 ID Type: Resolution Status: Approval Review

Meeting Body: Township Council File Created: 3/6/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff! This text was from the imported file. Agenda Date: 3/18/2026 Final Action:

Agenda Title/Recommendation Attachments (3) Associations Details Approval Tracking (3) Minutes History

Requester: Daystar

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Act
01	Granicus Approver	2	Approver	Individual Review Request	Disapproved	3/25/2026	Disapprove	3/22/2
02	Granicus Approver	2	Approver	Individual Review Request	Review Requested	3/25/2026		
03	Granicus Training	2	Approver	Individual Review Request				

Note:

Select the approver you want to delegate your sequence to. This will send them an email, letting them know they are up next to review and approve this item.

Approve Disapprove

Extend Due Date

Delegate

Barbara Nyitrai

Bill Epps

Deepthi Shah

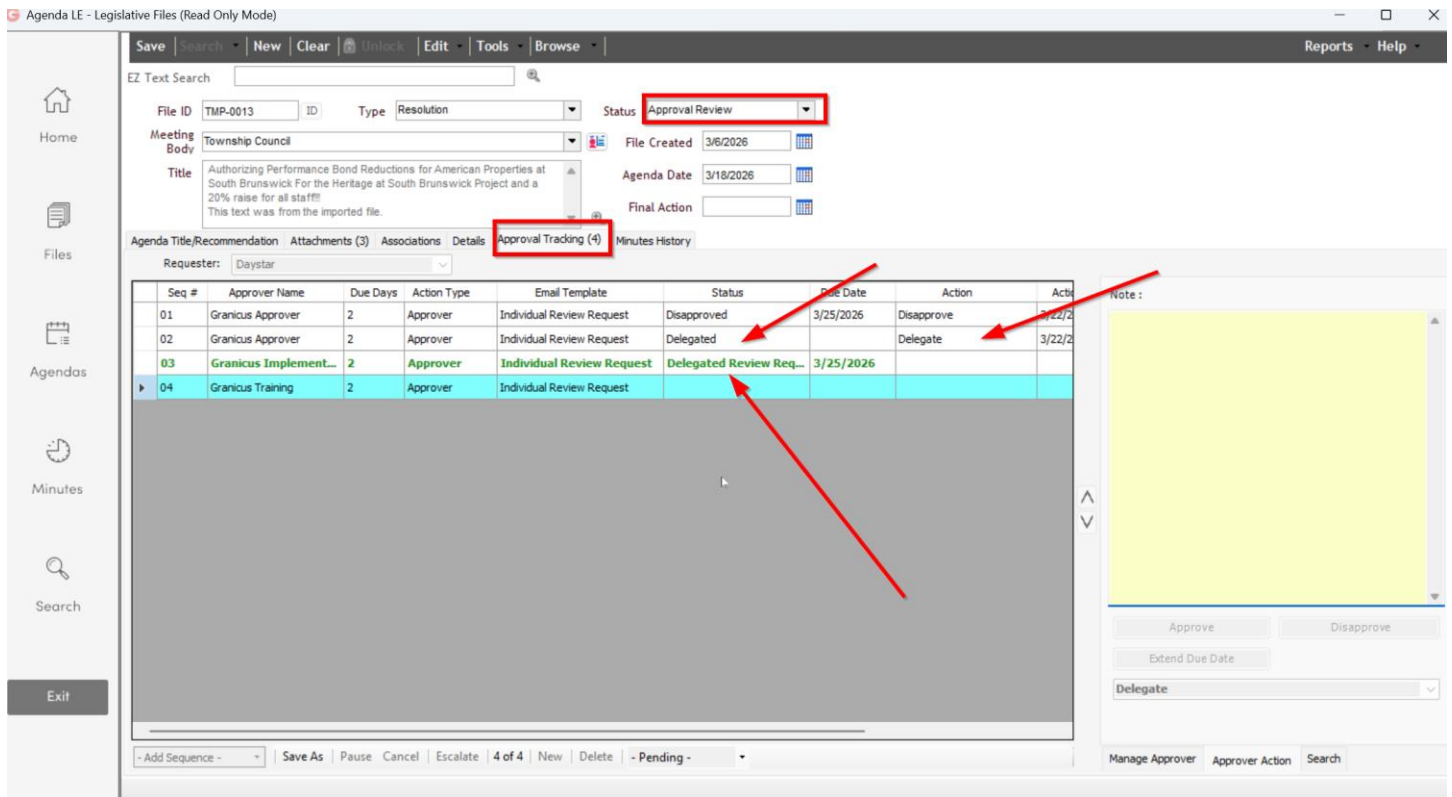
Granicus Approver

Granicus Implementation

Granicus Training

3. Use the **Delegate drop-down menu** to select the desired delegate Approver.
4. Click **Yes** at the confirmation window. The new Delegate Approver will appear in the grid as the active Approver, and the former Approver will have a record that their turn is complete. The Drafter and newly delegated Approver will receive emails about the delegation.

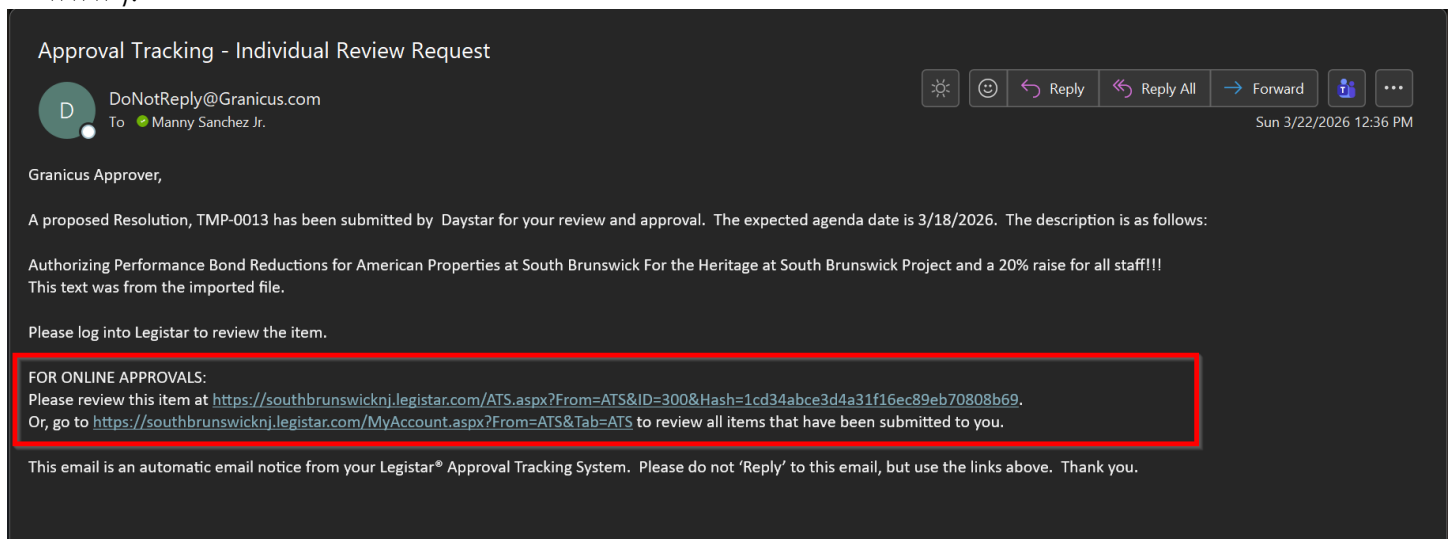
After you confirm your action, you can no longer edit this File. The status of the File will remain **Approval Review** and the Delegate Approver in the sequence is the only Approver that has access to edit and act on the File or Approval Sequence.



Reviewing a File on the Web

As an alternative to logging into Legistar, reviewers can access a web-based reviewer screen on your public facing InSite webpage.

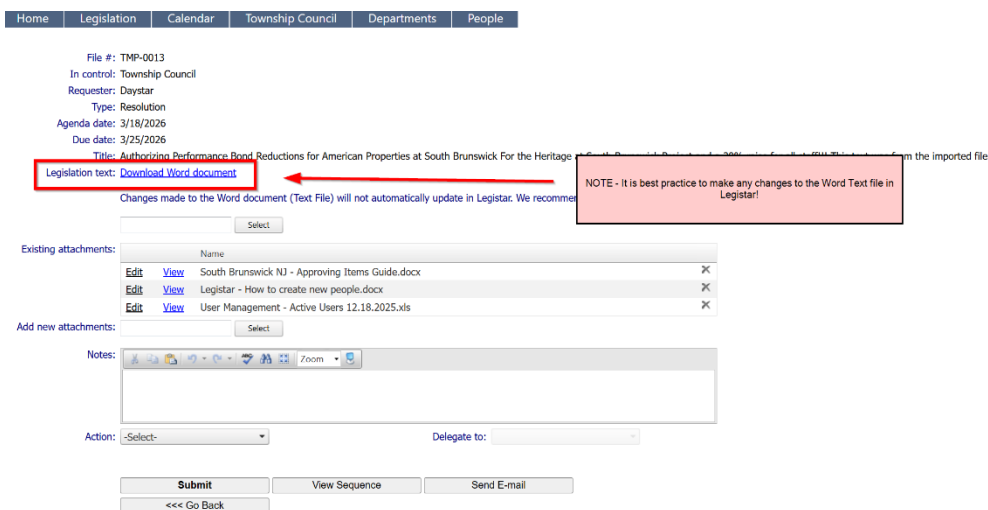
1. Navigate to your InSite webpage by clicking the link in your approval notice email or by entering the web address in your browser: <https://southbrunswicknj.legistar.com/> (remember to leave off the "www").



2. Sign in after clicking the link or click **Sign In** in the top right corner using your **Legistar Username and Password** if you did not click the link from the email.



3. Click the **Approval Tracking** tab. If you don't see that tab, click the **My Accounts** link in the top right corner to pull it up.
4. You can click **Approve** or **Disapprove** from this page if you're already familiar with the contents of the file. If you need to review the file, click the **File ID** of the item you would like to review.
5. Review the information on the screen. Please note that some of the InSite language is different from the language in your Legistar Files Module
6. To **make changes to the Staff Report** using Microsoft Word, Click **Download Word document** to view the **Agenda Item Body** text and other item details.



- Once the Word document downloads, you can review the Agenda Item Body details. **It is recommended that changes to the Microsoft Word document (Agenda Title/Recommendation) only be made in Legistar, and not via the website.**
- If changes are made to the Word Document, you will need to **Save** the edited document to your local device and then upload the updated Word document by clicking **Select**, navigating to your file, then selecting **Open**.
- If you upload a new Word Document, you must **choose an action**, then click **Submit** at the bottom of the page for the changes to be reflected in Legistar.

File #: TMP-0013
 In control: Township Council
 Requester: Daystar
 Type: Resolution
 Agenda date: 3/18/2026
 Due date: 3/25/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!! This text was from the imported file.

Legislation text: [Download Word document](#)

Changes made to the Word document (Text File) will not automatically update in Legistar. We recommend making changes in Legistar directly.

● TMP - 0013 - Updated File.dotx × Remove

Select

Updated version of the staff report I have downloaded, edited, and saved locally and selected below to upload.

Existing attachments:

Name	
South Brunswick NJ - Approving Items Guide.docx	✕
Legistar - How to create new people.docx	✕
User Management - Active Users 12.18.2025.xls	✕

Add new attachments: Select

Notes:

Action: -Select- Delegate to:

Submit View Sequence Send E-mail

<<< Go Back

- Click **View** to review attachments.
- Click **Edit** to modify attachment names.
- If you make any changes to an existing attachment or need to upload a new attachment, do so using the **Add new attachments** field. **Delete the existing attachment** by clicking the **X** at the end of the Existing Attachments grid.

NOTE: If you upload a new attachment, you must choose an **Action**, then click **Submit** for the changes to reflect in Legistar. (see photo below)

File #: TMP-0013
 In control: Township Council
 Requester: Daystar
 Type: Resolution
 Agenda date: 3/18/2026
 Due date: 3/25/2026

Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!!! This text was from the imported file.

Legislation text: [Download Word document](#)

Changes made to the Word document (Text File) will not automatically update in Legistar. We recommend making changes in Legistar directly.

● TMP - 0013 - Updated File.dotx × Remove

Select

Existing attachments:

Name	
South Brunswick NJ - Approving Items Guide.docx	✕
Legistar - How to create new people.docx	✕
User Management - Active Users 12.18.2025.xls	✕

Add new attachments: Select

Notes:

Add a new attachment here. Changes will only be reflected after clicking submit below.

Action: -Select- Delegate to:

Submit View Sequence Send E-mail

<<< Go Back

- Enter any **Notes** if needed. You must enter a Note before selecting an Action.
- Use the **Action** drop-down menu to select your approval action: *Approve*, *Delegate* or *Disapprove*. Extend Due Date is not an option for Approvers.
- Click **Submit**.

File #: TMP-0013
In control: Township Council
Requester: Daystar
Type: Resolution
Agenda date: 3/18/2026
Due date: 3/25/2026
Title: Authorizing Performance Bond Reductions for American Properties at South Brunswick For the Heritage at South Brunswick Project and a 20% raise for all staff!!! This text was from the imported file.
Legislation text: [Download Word document](#)

Changes made to the Word document (Text File) will not automatically update in Legistar. We recommend making changes in Legistar directly.

TMP - 0013 - Updated File.docx Remove

Select

Existing attachments:

Name		
Edit	View	South Brunswick NJ - Approving Items Guide.docx
Edit	View	Legistar - How to create new people.docx
Edit	View	User Management - Active Users 12.18.2025.xls

Add new attachments:

Select

Notes:

Notes: [Rich text editor area]

Action: [Dropdown menu with options: -Select-, Approve, Delegate, Disapprove, Extend Due Date]

Delegate to: [Dropdown menu]

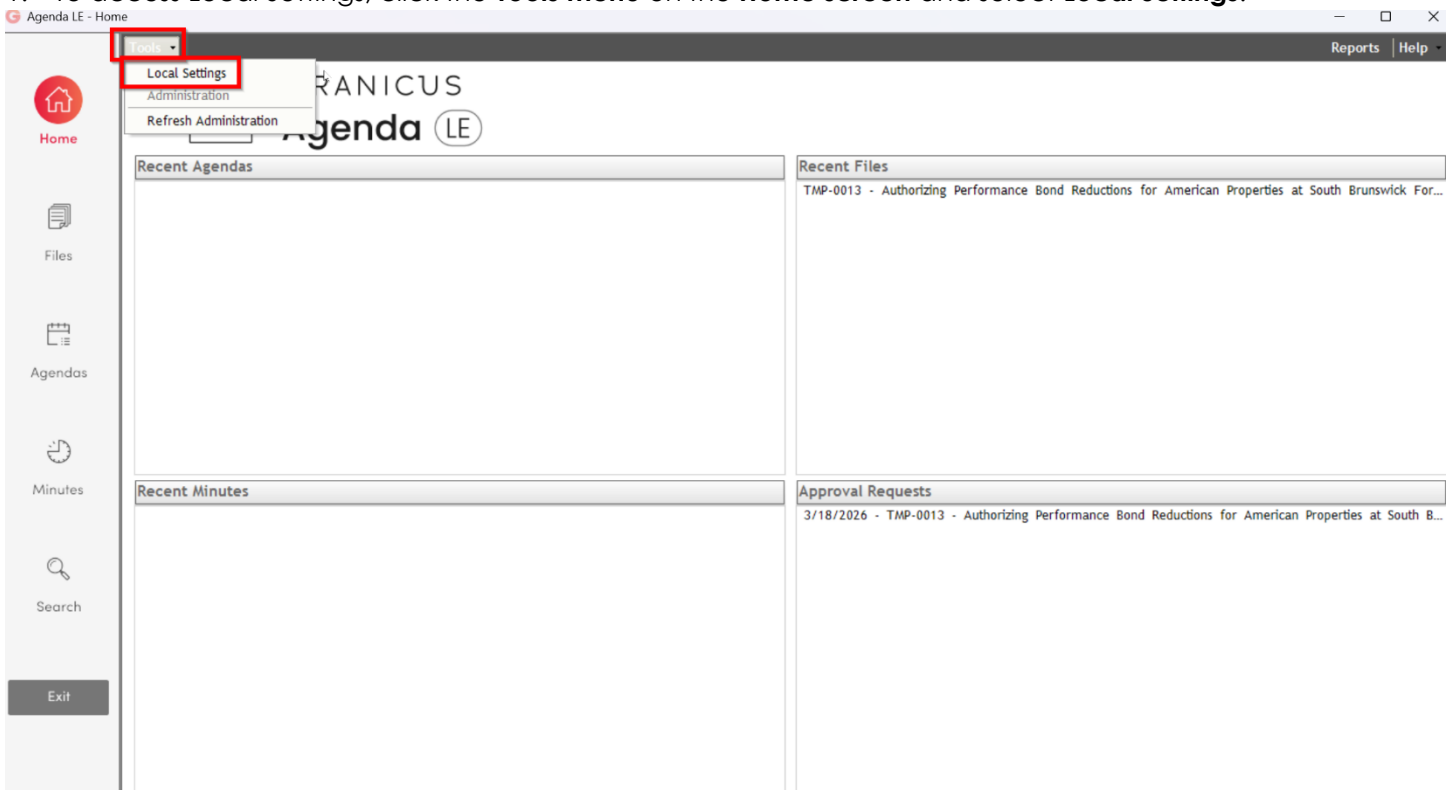
View Sequence

Send E-mail

Legistar Local Settings for Approvers

Each individual user has access to **Local Settings**. While there are many Local Settings available, the Local Settings detailed in this guide are specific to the needs of an Approver.

1. To access Local Settings, click the **Tools** menu on the **Home** screen and select **Local Settings**.



2. Change or reset your password on the **Password tab**. Enter your old (current) password, then your new password twice. **To be able to log into InSite your password must be 6 characters minimum.** There are not any character rules for setting your password, but please ensure it is something secure. **To apply changes, you must click Save.**

The screenshot shows the Legistar Home web application. On the left is a sidebar with icons for Home, Files, Agendas, and a clock. The top navigation bar includes 'Save', 'Tools', and 'Help'. Below this is a sub-navigation bar with 'Personal Settings', 'Password', and 'Out Of Office'. The 'Password' tab is selected and highlighted with a red box. The main content area is titled 'Change Password For User GDrafter' and contains three input fields: 'Old Password', 'New Password', and 'Confirm New'. A description box on the right states: 'Description: This screen allows a user to change their password'. The 'Save' button in the top navigation bar is also highlighted with a red box.

3. If you are going to be **out of the office**, you can assign another individual to receive any items that come to you during your out of office time. They will essentially be your "automatic delegate" to receive your items and act on them while you're away. Turn on/off your Out of Office setting on the **Out of Office tab**.
- Change "Out of Office?" to **Yes** to turn on the out of office feature.
 - Select the **person** who should be your Alternate/"automatic delegate" while you are away.
 - **To apply changes, you must click Save.**
 - **Be sure to Refresh Administration when you go to the Home tab.**

When you are **back in the office**, you must remember to come back to this Local Settings and **set "Out of Office?" back to No, then click Save** to turn your out of office feature *off* and allow items to come to you again.

Legistar - Home

Save

Tools

Help

Home

Files

Agendas

Minutes

Personal Settings

Password

Out Of Office

Out of Office?

Yes

No

Alternate Approver

Granicus BA

Description

Before you go out of office, enable the Out of Office status by selecting 'Yes' option to the left. You can either set who your alternate will be by selecting an approver from the drop-down list or you can set your approval to be 'auto approved' in the drop-down and go directly to the next person.

If you are assigned to an approval sequence while Out of Office, when the sequence reaches you, it automatically delegates to the alternate you have specified. Your alternate approver will receive a notification.

When you return, set your status to In Office by selecting 'No' for Out of Office.